GHL Foundation Setup Guide — Soleil Pharmacy

Complete this entire guide BEFORE building any workflows. Workflows depend on every item here existing first.

STEP 0 — HIPAA Compliance Mode

Do this first. Nothing else matters if this isn't on.

1. Go to **Settings → Business Profile**
2. Scroll to **HIPAA Compliance** section
3. Toggle **ON**
4. GHL will prompt you to sign a **Business Associate Agreement (BAA)** — sign it
5. Confirm the account is on the **$297/mo plan or higher** (HIPAA mode requires it)

> *Once enabled: GHL will restrict certain features (some email tracking pixels are disabled, conversation logs are handled differently). This is correct behavior.*

STEP 1 — Create Custom Values

Settings → Custom Values → + Add

These are account-wide variables used in workflow templates.

Name	Key (auto-generated)	Value to set
Secure Payment Link	`secure_payment_link`	URL of your payment + consent portal page
Pharmacy Address	`pharmacy_address`	Full address for pickup instructions
Pharmacy Phone	`pharmacy_phone`	Main pharmacy phone number
Pharmacy Hours	`pharmacy_hours`	e.g. "Mon–Fri 9am–6pm, Sat 10am–3pm"
Portal Guide URL	`portal_guide_url`	URL to the prescriber portal PDF/page
Calendly Link	`calendly_link`	Onboarding call booking link

> *In workflows, these are referenced as* `{{custom_values.secure_payment_link}}` *etc.*

STEP 2 — Create Custom Fields (Contact Level)

Settings → Custom Fields → + Add Field → Contact

Create two groups: **Provider** and **Patient**

Group: Provider Fields

Field Label	Field Key	Type	Options
NPI Number	`npi_number`	Text	—
Clinic Name	`clinic_name`	Text	—
Preferred Communication	`preferred_communication`	Dropdown	Email, SMS, Portal
Portal Activation Date	`portal_activation_date`	Date	—
Contract Signed Date	`contract_signed_date`	Date	—

Group: Patient Fields

Field Label	Field Key	Type	Options
Pioneer Rx #	`pioneer_rx_number`	Text	—
Formula ID	`formula_id`	Text	—
Prescriber Name	`prescriber_name`	Text	—
Prescriber NPI	`prescriber_npi`	Text	—
Days Supply	`days_supply`	Number	—
Rx Expiration Date	`rx_expiration_date`	Date	—
Refill Count Remaining	`refill_count_remaining`	Number	—
Compound Type	`compound_type`	Dropdown	Sterile, Non-Sterile
Consent Signed Date	`consent_signed_date`	Date	—
Payment Date	`payment_date`	Date	—
Shipped Date	`shipped_date`	Date	—
Tracking Number	`tracking_number`	Text	—
Shipment Carrier	`shipment_carrier`	Dropdown	UPS, FedEx, USPS, Other
Preferred Language	`preferred_language`	Dropdown	English, Korean, Vietnamese, Other
Auto-Refill Enrolled	`auto_refill_enrolled`	Checkbox	—

STEP 3 — Create Tags

Contacts → Tags → Manage Tags (or they auto-create when added in workflows)

Create these tags now so they're searchable and consistent:

Provider Tags
- `B2B-Lead`
- `Portal-Activated`
- `Contract-Signed`
- `Legacy-Fax-User`
- `Portal-Training-Pending`
- `High-Volume-Clinic`

Patient Tags
- `Rx-Received`
- `Pharmacist-Review-Pending`
- `Payment-Pending`
- `Payment-Complete`
- `Consent-Signed`
- `Compounding`
- `Shipped`
- `Refill-Due`
- `Refill-Auth-Active`
- `New-Rx-Required`
- `Auto-Refill-Enrolled`
- `Korean-Language`
- `Rx-Expired`
- `Refill-Requested`

> **How to pre-create tags:** *Go to any contact → Tags field → type the tag name → save. It now exists account-wide.*

STEP 4 — Create Pipeline 1: B2B Provider Sales Pipeline

CRM → Pipelines → + New Pipeline

Pipeline Name: `B2B Provider Sales Pipeline`

Create stages in this exact order:

#	Stage Name	Color suggestion
1	Lead	Gray
2	Contacted	Blue
3	Demo Scheduled	Light Blue
4	Credentialing	Yellow
5	Contract Signed	Orange
6	Portal Activated	Green

Settings:

- Currency: USD
- Opportunity Value: leave blank (not a revenue pipeline, it's operational)

STEP 5 — Create Pipeline 2: Patient Rx Fulfillment Pipeline

CRM → Pipelines → + New Pipeline

Pipeline Name: `Patient Rx Fulfillment Pipeline`

Create stages in this exact order:

#	Stage Name	Color suggestion	Notes
1	Rx Received	Gray	Webhook drops patients here
2	Pharmacist Review	Yellow	SLA: 2hr max
3	Pending Payment	Orange	Triggers payment chase workflow
4	Compounding	Purple	Pioneer operational stage
5	Ready for Pickup	Light Green	
6	Shipped	Blue	Triggers shipping notification
7	Complete	Green	Final stage

Settings:

- Currency: USD
- Opportunity value: set to invoice amount when known

STEP 6 — Create Email Templates

Marketing → Emails → Templates → + New Template

Create these 5 templates now (copy/paste body below):

Template 1: Welcome to Soleil Prescriber Portal

Subject: Welcome to the Soleil Pharmacy Prescriber Portal

```
Hello {{contact.first_name}},

Welcome to the Soleil Pharmacy Prescriber Portal. We're excited to have you
on board.

Your portal gives you direct access to:
— Submit prescriptions instantly via Formula ID
— Track order status in real time
— Manage your patient roster

To get started, please review the setup guide here:
{{custom_values.portal_guide_url}}

If you'd like a walkthrough, you can book a 15-minute onboarding call here:
{{custom_values.calendly_link}}

We're here to make the prescription process seamless for you and your
patients.

Warm regards,
The Soleil Pharmacy Team
```

Template 2: Action Required — Complete Your Soleil Pharmacy Order

Subject: Action Required: Soleil Pharmacy Order

```
Hello {{contact.first_name}},

Your order from Soleil Pharmacy requires your attention before we can
proceed with fulfillment.

Please click the secure link below to complete your payment and sign the
necessary consent forms:

{{custom_values.secure_payment_link}}

This step is required to process your order. If you have any questions,
please reply to this email or call us at {{custom_values.pharmacy_phone}}.

Thank you,
Soleil Pharmacy Team
```

Template 3: Payment Reminder

Subject: Reminder: Action Required — Soleil Pharmacy Order

```
Hello {{contact.first_name}},

This is a friendly reminder that your Soleil Pharmacy order is still
waiting on your payment and consent forms.

Complete your order securely here:
{{custom_values.secure_payment_link}}

If you need assistance, we're happy to help. Call us at
{{custom_values.pharmacy_phone}} or reply to this email.

Thank you,
Soleil Pharmacy Team
```

Template 4: Your Order Has Shipped

Subject: Your Soleil Pharmacy Order Has Shipped

```
Hello {{contact.first_name}},

Great news — your Soleil Pharmacy order is on its way!

Carrier: {{contact.shipment_carrier}}
Tracking: {{contact.tracking_number}}

If you have any questions about your delivery, please call us at
{{custom_values.pharmacy_phone}} or visit us at
{{custom_values.pharmacy_address}}.

Thank you for choosing Soleil Pharmacy.

Soleil Pharmacy Team
```

Template 5: Your Order is Ready for Pickup

Subject: Your Soleil Pharmacy Order is Ready

```
Hello {{contact.first_name}},

Your Soleil Pharmacy order is ready and waiting for you!

Pickup Location: {{custom_values.pharmacy_address}}
Hours: {{custom_values.pharmacy_hours}}

Please bring a valid photo ID when you come in.

See you soon,
Soleil Pharmacy Team
```

STEP 7 — Verify API Connection

Settings → Integrations → API

Confirm your credentials match exactly:

```
GHL_API_KEY=eyJhbGciOiJIUzI1NiIsInR5cCI6IkpXVCJ9.eyJsb2NhdGlvbl9pZCI6Ik9LSWhTN
GHL_LOCATION_ID=OKIhS7IwmBqsinp4BOzV
```

```
GHL_COMPANY_ID=HKCGEOz3ZsjJmOHPhvas
```

Note: The Location ID and Company ID in `.env.local` *were corrupted by Gemini — already fixed.*

STEP 8 — SMS Compliance Setup

Settings → Phone Numbers → Compliance

Before any SMS workflow goes live:

1. **Register your 10DLC number** (required for business SMS in the US)
   - Business name: Soleil Pharmacy
   - Use case: Healthcare / Transactional
   - Message samples: use the generic templates above

2. **Confirm opt-out language** — GHL automatically appends "Reply STOP to opt out" to first SMS. Verify this is ON.
3. **HIPAA note:** Do not send PHI via SMS. Templates above are already compliant.

Foundation Checklist — Sign Off Before Building Workflows

- ☐ HIPAA mode ON + BAA signed
- ☐ All 6 Custom Values created + values populated
- ☐ All 15 Patient custom fields created
- ☐ All 5 Provider custom fields created
- ☐ All 14 tags created
- ☐ B2B Provider Sales Pipeline created (6 stages)
- ☐ Patient Rx Fulfillment Pipeline created (7 stages)
- ☐ All 5 email templates created
- ☐ 10DLC SMS registration submitted
- ☐ API credentials verified in `.env.local`

Once all boxes are checked → proceed to Workflow builds.

Workflow Build Order (After Foundation Complete)

Priority	Workflow	Trigger	Estimated build time
1	Patient Payment & Consent Chase	Pipeline → Pending Payment	20 min
2	Rx Intake & Pharmacist Alert	Inbound Webhook	15 min
3	Order Status Notifications (Shipped + Pickup)	Pipeline stage change	10 min
4	Refill Reminder Sequence	Tag: Shipped + date math	20 min
5	B2B Lead Nurture & Onboarding	Tag: B2B-Lead	15 min
6	Provider Portal Onboarding	Pipeline → Contract Signed	15 min
7	Legacy Fax Exception	Tag: Legacy-Fax-User	10 min